

An Estate Plan Tailored to Your Needs

Each of these planning levels can be uniquely structured to reflect your situation and objectives

	Family Plan	Trust Plan	Wealth Plan
YOUR SITUATION	You do not own assets that would be subject to probate	You own assets that would be subject to probate, and you want your assets transferred to your heirs easily, conveniently, and without the involvement of the courts	You own assets that would be subject to probate, you want your assets transferred to your heirs without the involvement of the courts, and, in managing your assets, you want the greatest amount of convenience and care
YOUR OBJECTIVES	<ul style="list-style-type: none"> • Your minor children will be well cared for if you die or are incapacitated • Your health care wishes are expressed in binding directives • If you become incapacitated, your loved ones can access your assets in order to provide for your care 	<p><i>Similar to the Family Plan, plus the following objective:</i></p> <ul style="list-style-type: none"> • Your heirs' and spouse's inheritance will be protected from estate taxes, lawsuits, and claims by third parties • Estate tax savings, in the event you have a taxable estate 	<p><i>Same as the Trust Plan</i></p>
PLAN FEATURES	<ul style="list-style-type: none"> • Basic wills • Testamentary trusts, if needed, for the protection of minor children • Health care powers of attorney and living wills to ensure that your medical treatment and care wishes are honored • General (durable) powers of attorney 	<p><i>The Family Plan, plus:</i></p> <ul style="list-style-type: none"> • A trust agreement that provides detailed instructions as to who will take care of your children if something happens to you • Guidance from your Hoopes & Adams attorney on how to transfer your assets into your trust • The peace of mind gained from knowing that, in the event of your death or incapacity, your Hoopes & Adams attorney is available to advise your family members about how to care for you and your assets 	<p><i>The Trust Plan, plus:</i></p> <ul style="list-style-type: none"> • Professional inventory and analysis of your assets, to confirm what you own and how it is held • Assistance in identifying assets that should be owned by your trust • Assistance in identifying your trust's beneficiaries and designating the assets that they are to receive • Professional re-titling of your assets as appropriate to thoroughly and accurately transfer ownership of those assets to your trust
FEE RANGE	\$1,000 - \$1,500	\$2,500 - \$5,000	\$4,000 - \$6,500